



## Equality in Union Culture

Practical Guide to Establish Equality Policies in Union Organization

the 1990s, the number of people in the UK who are employed in the public sector has increased from 10.5 million to 13.5 million, and the number of people in the public sector who are employed in health care has increased from 2.5 million to 3.5 million (Department of Health 2000).

There are a number of reasons for the increase in the number of people employed in the public sector. One reason is that the public sector has become a major employer in the UK. Another reason is that the public sector has become a major employer in the health care sector. A third reason is that the public sector has become a major employer in the social care sector. A fourth reason is that the public sector has become a major employer in the education sector.

The increase in the number of people employed in the public sector has led to a number of changes in the way that the public sector is organized. One change is that the public sector has become more decentralized. Another change is that the public sector has become more market-oriented. A third change is that the public sector has become more customer-oriented. A fourth change is that the public sector has become more performance-oriented.

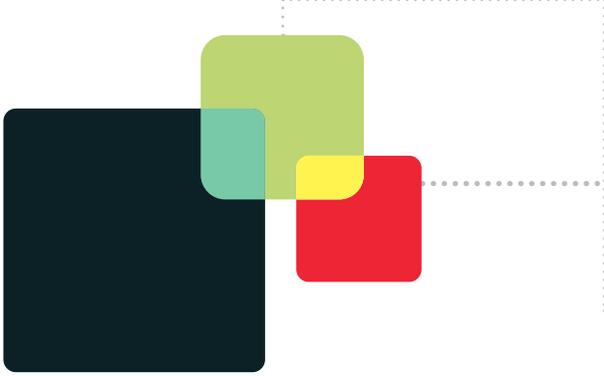
The changes in the way that the public sector is organized have led to a number of challenges for the public sector. One challenge is that the public sector has become more complex. Another challenge is that the public sector has become more competitive. A third challenge is that the public sector has become more demanding. A fourth challenge is that the public sector has become more demanding.

The challenges that the public sector faces are a result of the changes in the way that the public sector is organized. The public sector must find ways to meet these challenges in order to continue to provide the services that it is expected to provide. The public sector must find ways to become more efficient, more effective, and more customer-oriented. The public sector must find ways to become more performance-oriented and more demanding.

The public sector must find ways to meet these challenges in order to continue to provide the services that it is expected to provide. The public sector must find ways to become more efficient, more effective, and more customer-oriented. The public sector must find ways to become more performance-oriented and more demanding.

The public sector must find ways to meet these challenges in order to continue to provide the services that it is expected to provide. The public sector must find ways to become more efficient, more effective, and more customer-oriented. The public sector must find ways to become more performance-oriented and more demanding.

The public sector must find ways to meet these challenges in order to continue to provide the services that it is expected to provide. The public sector must find ways to become more efficient, more effective, and more customer-oriented. The public sector must find ways to become more performance-oriented and more demanding.



## Preliminary Words

Verónica Fernández Méndez  
Equal Opportunities Department  
UNI global union

One of the main objectives set by UNI Global Union, through its Equal Opportunities Department has been to attain productive development based on gender equality. We regard this principle as essential to achieving sustainable development and true social justice for everyone.

The Equal Opportunities Department carries out programmes, campaigns and other activities in order to fulfil this goal, both within the organization and among our affiliates, **who will, in turn, act as advocates and role models in their communities.**

This practical guide is one of the actions called for by a resolution passed in UNI's World Congress in 2010 called *Breaking Through on Women's Representation at UNI Global Union*. It set the target of "reaching 40% representation of any one gender in all UNI decision-making structures, (...) by the 2014 Conference"...

In the same resolution, the Congress committed itself to secure the active involvement of all member unions to develop action plans to organise work under equality principles in their organisations.

This guide is a response to that objective. It offers tools and specific instruments to attain an organisational structure based on a gender-equality perspective. It has been written for all unions that want to start or delve into this kind of changing process.

Together with the launching of the 40:40 percentage campaign, this document represents a step further for UNI Equal Opportunities to guarantee equality of opportunities and rights for men and women worldwide. A commitment we have been carrying through ever since UNI was founded, and where all our efforts are geared.

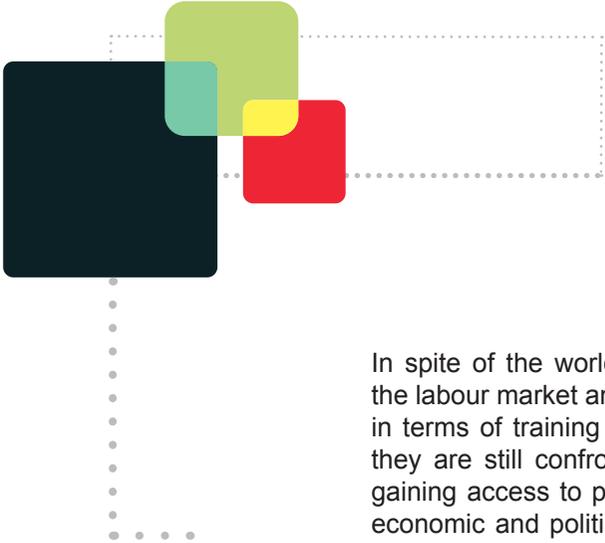


## Contents

<b>Introduction</b>	2
<b>1. Basic concepts</b>	4
<b>1. a. What is Gender Equality?</b>	4
<b>1.b. Importance and Benefits of Gender Equality</b>	5
<b>1.c What is an Equality Policy?</b>	6
<b>1.c.1 What is a Programme?</b>	7
<b>2. Developing a Gender Equality Policy First Steps</b>	8
<b>2. a. The Diagnosis – The Union’s Constituent Characteristics</b>	8
2.a.1. General Description of the Organisation	8
2.A.2 Gender Mainstreaming Indicators	9
2.A.2.a The Union’s Demographic Structure: Gender Participation and Distribution at Each Level.	10
2.a.2.b Appointments to the Organisation, Positions Held, Functions and Competencies	10
2.a.2.c Training	11
2.a.2.d Remuneration	11
2.a.2.e Work-Life Balance	12
2.a.2.f Work Climate	12
<b>2.b. Description of Detected Problems. What is     a Problem?</b>	12

---

<b>2.c. Setting Objectives</b>	13
<b>2.c.1 How Can We Set Objectives?</b>	13
2.c.2 Measuring Objectives and Setting Deadlines	14
<b>3. Designing Activities and programmes. Some Guidelines</b>	16
<b>3.a. Participation and Quotas</b>	16
<b>3.b Specific Institutional Structures</b>	17
<b>3.c Training</b>	18
<b>3.d Communication, Information and the Culture of Equality</b>	18
<b>3.e Work-Life Balance</b>	19
<b>4. Evaluating Achievements, Transparency and Communication</b>	20
<b>4.a The Evaluation</b>	20
4.a.1 The Link Between Achievements and Key Performance Indicators.	20
<b>4.b Publishing the Policy and the Achievements</b>	22
4.b.1 How Can Information Be Systematized? Using a Matrix	23
<b>5. Questionnaire on Policies and Best practices in Gender Equality</b>	25
<b>Bibliography</b>	27



## Introduction

In spite of the world trend towards feminization in the labour market and women's great achievements in terms of training and professional development, they are still confronted with serious difficulties in gaining access to positions of responsibility in the economic and political sectors and oftentimes also within unions. Their limited participation is due to the persistence of cultural patterns that have assigned men to positions of power and that discriminate against women.

Naturally, unionism is no exception. For years, it has been a stronghold of male power. However, the growing presence of women in the labour market and the struggle to improve their working conditions has highlighted that women's participation in unions' activities is crucial to give the labour world and union affairs a gender– perspective standpoint.

Apart from the cultural imprinting, there is also a lack of policies that allow men and women to get easier and equal access to the different resources of organisations and of society as a whole; economic, political, educational, and even time constraints; for example, in the work– life balance ratio and the fair distribution of family and household chores.

Therefore, **one of the biggest challenges for the union movement is to succeed in putting into action an effective means of participation in power structures for men and women. This will help build a union movement with equal participation for both genders.**

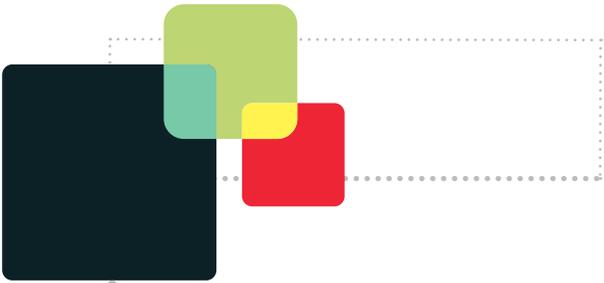
---

Publishing this guide is a response to that challenge. In it, unions will find a brief and easy– language set of concepts and procedures that will let them start their planning process for the organisational structure of their unions and foster equality by framing new policies – or reviewing existing ones – that promote gender mainstreaming.

It is not a step– by– step guide to follow by the book, but rather seeks to give guidance to unions so that each, under its idiosyncratic characteristics, can reflect upon women’s situations within their organisation and act accordingly.

If women achieve equitable representation in the organisation, negotiation and decision– making environments, they will convey the same message outside their organisations; thus turning into advocates and role models in the task of empowering and organising women and of promoting equality in their communities at large.

Diversity is a treasure of humankind.



## 1. Basic concepts

### 1. a. What is Gender Equality?

**Gender equality**, that is, equality between men and women, entails the concept that every human being is free to develop their personal abilities and make decisions without any constraints imposed on them by stereotypes, strict gender roles or prejudice. Gender equality means that the distinctive behaviour, needs, and ambitions of both men and women are valued, and equally weighed and catered for. Equality does not mean that men and women should wipe out their distinctive features, but that their rights, responsibilities, and opportunities should not depend on gender.

**Gender equality** means equal treatment for men and women, in terms of their inherent needs. This might include same or different treatment but equal as far as rights, benefits, obligations, and opportunities are concerned.<sup>1</sup>

Likewise, **gender** is a social construct, which the collective imagination has linked to symbolic aspects that societies grant to men and women. They expect certain distinctive attitudes and behaviours from each gender; the “ought” for both.

These roles, passed down in the families, at schools and other social structures, restrain the activities, tasks, and responsibilities for men and women only to those seen as appropriate for either gender. They affect all aspects related to work, such as working conditions, social security benefits, representation, remuneration, and positions they have access to. Thus, gender equality is an issue that runs across all the world of work. Gender relationships are also power relationships that define who can have access to and control the material and intangible resources of an organisation, a group or a society.

Gender equality is therefore the skill to give fair and equal treatment to men and women’s needs. It is not a battle between men and women. It does not mean

<sup>1</sup> El ABC de los Derechos de la Mujer y la Igualdad de Género – OIT, Ginebra, 2000, p.48. (ABC of Women Workers Rights and Gender Equality, ILO, Geneva, 2000, p. 48).

---

giving more benefits to women to harm men. Rather, it means having equal access to the same benefits under equal conditions and rights. This is the only way for women and men to have the chance to choose and decide in a strategic and positive way on their lifestyles.

### **1.b. Importance and Benefits of Gender Equality**

Primarily, gender equality is a **human right**, and thus a fundamental aspect that should be tackled by any organisation – government, union or any other type – committed to improving people’s living conditions.

Furthermore, full and equitable male and female participation is a crucial aspect for the economic and social development of any society, if it seeks effectiveness and sustainability. It also contributes to attaining a more comprehensive citizenship and to strengthening social democracy.

In the specific case of unions and equality culture:

- it enables new perspectives to be integrated into the bargaining agenda, by drawing on women’s experiences, opinions, knowledge and skills;
- Mixed collective bargaining teams also enable new styles and new approaches to collective bargaining methods.<sup>2</sup>
- It improves the organisational climate, which results in higher proactivity and respect among workers and between sexes;
- it improves internal communication;
- it allows unions to learn about women’s opinions and take their needs into account when planning any activity in the union;

---

2 Resolución de la ETUC – Recomendaciones para Mejorar el Balance de Género en los Sindicatos – Enero, 2011 (ETUC. Resolution – Recommendations for Improving Gender Balance in Trade Unions – January 2011.)

- it increases the sense of belonging to the union movement and the members' commitment and loyalty;
- It is a way to GROW\* not only for women but also for unions, creating a new dimension for the affiliates and in accordance with UNI Global Union campaigning and organising results. Building women's leadership is an essential part of all changes to grow. (\*GROW – Get –recognition-organise – workers -) is part of the UNI Global Union Breaking Through strategy initiative)
- Lastly, by promoting equality inside unions, equality of opportunity for men and women is also promoted in the labour world, and the external image of unions improves, as they gain a reputation for being an example of best practice, and greater support from men and women who are willing to be part of the union movement.

*If unions are aware of their leading role in improving women workers' life quality, they must deal with gender equality as a key issue in their activities. The first step to take is within their organisations.*

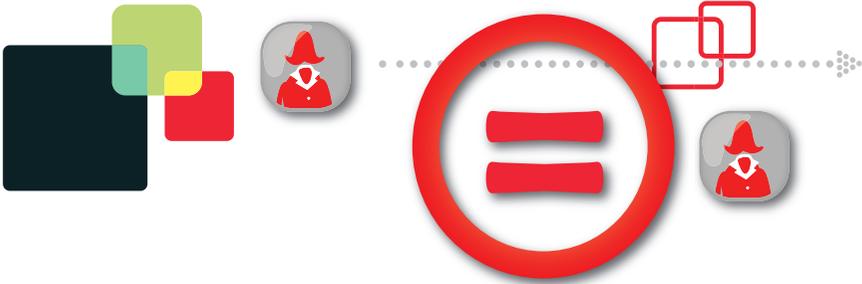
### 1.c What is an Equality Policy?

An Equality Policy is a set of decisions, principles and norms that seek to change a problematic situation into a favourable one within a country, sector or organisation. It outlines concrete objectives and targets, as well as deadlines and instruments to verify progress towards attainment of those objectives. This turns the policy into more than the mere intention of improving a certain situation: **it is a working plan that starts by defining the current situation and builds towards a future result to be reached through a number of actions developed within a certain timeframe.**

An equality policy is that which, once diversity has been accepted, is designed to solve existing inequalities between men and women within a specific group.

### 1.c.1 What is a Programme?

A programme is a specific unit of action, consisting of a number of processes and activities that aim at changing a specific aspect of the overall current situation that the policy regards as a problem to be solved.



For example, within a gender equality policy, we can find programmes that deal with different aspects but have the same ultimate objective. If, for instance, a union wants to increase women's participation within its structure, it may develop and implement a training programme on leadership for women, a programme on how to improve work-life balance, a programme on gender equality, etc.



## 2. Developing a Gender Equality Policy – First Steps

The general objective of a gender equality policy within a union is changing the institutional structure by giving equal access and participation to both men and women in all senior and decision-making positions: representational roles, management, training and collective bargaining.

To design and implement women's inclusion and effective representation initiatives, the first step unions should take is finding out the current situation for women in the organisation. This means clearly defining the existing problems and setting short-term and long-term objectives.

### 2. a. The Diagnosis – The Union's Constituent Characteristics

#### 2.a.1. General Description of the Organisation

In order to carry out a useful diagnosis to later set the policy's objectives, the union should first issue a full description of the organisation, the target population, the organisational culture and its action field.

It is essential to survey the information at all levels and ensure that the organisational description fully reflects the union's organisational reality. Below, we suggest a series of questions that may help with the design of the survey.

**What are the general characteristics of our organisation? (Sector, Level of Action – National or Multinational –, Location, Political, Economic, and Social Context.)**

**What are the main aspects in our history? (Foundation, growth, well-known people in our history)**

**What do we want to achieve? What is our mission?**

**What are the values that lead our actions? Is it necessary to redefine them?**

---

***Developing a policy without a thorough diagnosis is a serious risk in that it may not have any impact at all. That is why it is essential that the background information is statistically highly accurate, reducing to a minimum the margin of error.***

**Is our organisation open to changes? Is it flexible enough to adapt itself to changes or is it rigid and traditional?**

**Who are our end users? What do they consider valuable in the way we act?**

**Who are our potential users? How can we reach them? Are we succeeding?**

**What is the structure of our organisation?**

**How and by whom are decisions made?**

**What is our leadership style?**

**What is the institutional climate like? What are the interpersonal relationships like?**

**What are our communication channels?**

**Do we engage in teamwork or in individual actions?**

**Are members motivated?**

**Does our organisation work with other organisations?**

**What is the external image of our organisation? Should it change?**

**What are our strengths? What are our weaknesses?**

## **2.A.2 Gender Mainstreaming Indicators**

As the aim is to develop a Gender Equality Policy, once the general description of the organisation is complete, you should focus on those aspects concerning the situation of men and women within the union.

**We strongly recommend not starting with the analysis of those aspects, without the background information provided by the general description. It is imperative to define gender variables within the framework of reference of each organisation.** Many times, the answer to the problem lies in the existence of certain values, leadership styles, rigid organisational structures or external aspects that must be identified in order to reach a correct diagnosis.

Below, you will find a series of indicators and guiding questions that may help when carrying out the suggested analysis.

### **2.A.2.a The Union’s Demographic Structure: Gender Participation and Distribution at Each Level.**

The aim is to design a survey template to populate with the number of men and women at each level of the organisation and to express the figures as percentages of the total. Once the policy has been implemented, your organisation will be able to monitor and evaluate progress.

Sample Survey Template:

	Men	%	Women	%
Total Number of Members				
Executive Committee				
Congress/ General Assembly				
Secretariat				
General Staff				
Affiliates of the unions				

### **2.a.2.b Appointments to the Organisation, Positions Held, Functions and Competencies**

Does the organisation have a selection and appointment system?

Is the staff selection process based on the competencies defined for each position? Is it an open-door process?

Are the different positions in the organisation described through gender stereotypes?

Does our organisation have a professional performance evaluation with criteria clearly defined and known by all the members of the organisation?

Are there positions or sectors where only men work? Why? Would it be possible for women to work in those sectors/positions? Why? Are there any difficulties they would have to face? (Physical, infrastructural, relationships, timetables or shifts, etc.)

Are there any sectors in our organisation with a larger number of women? Which are they? Why does this happen? Are they sectors that men in the organisation

consider valuable? And the leadership?

Are there any positions in the organisation structure that are reserved for women only?

How are decision-making posts distributed? Are there any women in those positions?

Are there any women with employees under their supervision? If so, do those women have to face any difficulties to carry out their tasks? Which ones?

Are all workers informed of vacancies in senior positions? Do they all have the same opportunity to get to those positions?

### **2.a.2.c Training**

Is there an annual training plan?

Are there modules on occupational health and security included in the training programmes? Are there any on gender/diversity?

Are there training workshops/courses for trainers (union leaders)? If so, do they include modules on gender or diversity?

Are courses equitably distributed between men and women according to their type, duration, or schedule?

Is training done within the working hours?

When it is not, does your organisation count the hours devoted to training as worked hours?

When training is not scheduled within the working hours, is there a way to make up for those hours? If so, which one is it?

When training is not provided within the working hours, is there any other way workers can have access to the courses? Which one/s?

How does the organisation detect training needs/requirements?

Are there systematic records of the training courses taken by each worker (man or woman)?

Are there systematic records of training courses to divide them into operative training and strategic training? (The former aimed at improving the skills for daily work and the latter to increase the potential of workers' development.)

### **2.a.2.d Remuneration**

Does the union have a remuneration system or structure that determines the wages for each position or category? If so, is that structure public and easily accessible to everyone? What are the average wages without extra compensation, such as overtime, or benefits in terms of gender and hierarchy? What are the organisation's remuneration and incentives/allowances/benefits criteria?

Are there more allowances adding up to the minimum wage for men? Are there

any differences in the wages men and women earn while doing the same job or having the same responsibilities?

### **2.a.2.e Work-Life Balance**

Are there any measures for men and women to balance their professional careers with their family responsibilities? Which are they? Should your organisation implement others?

Are there communication channels for men and women workers to express their needs in terms of work-life balance?

Are there any regulations to protect nursing mothers and breastfeeding (nursing breaks, nursing facilities, etc.)

Are there childcare facilities in the organisation?

Does your organisation promote access to information about Sexual and Reproductive Health?

### **2.a.2.f Work Climate**

Have any efforts been made to measure work climate?

Are there any mechanisms to prevent and tackle the issue of gender violence?

Are there any mechanisms within the organisation (commissions, specific personnel appointed) in charge of the reception and follow-up of cases of violence, sexual harassment, bullying and other inequalities? Are they effective?

Could they be improved in some way?

## **2.b. Description of Detected Problems. What is a Problem?**

Once your organisation has reached a diagnosis, provided it is the result of thorough analysis, you will be able to detect the shortcomings or problem areas quite clearly. On the basis of that information, you can outline a policy to solve them.

Inasmuch as a good diagnosis is essential, **the accurate wording of the problems found is fundamental for the policy to be successful as the definition of a problem always entails its solution.**

***The accurate wording of the problems found is fundamental for the policy to be successful as the definition of a problem always entails its solution.***

For example, it is not the same to say that in an organisation

***“There is little women’s participation in training activities.”***

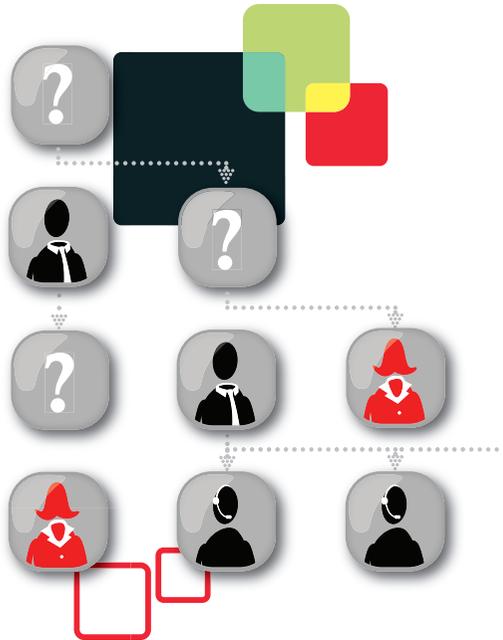
as to define the problem with the following wording:

***“Women find institutional obstacles that prevent them from participating in training activities.”***

(an obstacle could be, for instance, the lack of a schedule that takes into account family responsibilities.)

This is why, although it may look like pure common sense, you must bear in mind that a problem is not just any negative situation but one that can be empirically proved and requires special attention.

Once you define and agree on the problems within your organisation, the next step is defining general and specific objectives.



## 2.c. Setting Objectives

Again, this step depends on having followed the correct procedures in the previous steps. That is, the objectives should follow from the problems previously defined.

### 2.c.1 How Can We Set Objectives?

In order to specify the objectives, **you must first turn the detected problems into positive actions.** This means that, in our previous example, if one of the problems has been defined as

***“Women find institutional obstacles that prevent them from participating in training activities.”***

The objective springing from it will be

***“to set institutional mechanisms in order to foster women’s participation in training activities and to double women’s participation next year.”***

You must bear in mind that a problem may be tackled from different angles. Problems are seldom simple. This is why objectives are divided into general and specific. Each specific objective will therefore deal with a different angle of the problem.

The objective set in our previous example, ***“to set institutional mechanisms in order to foster women’s participation in training activities and to double them next year.”*** is a general objective. In order to fulfil this objective, we need to establish other more specific objectives dealing with different aspects of the problem; for example, time scheduled for training, modules included, criteria to select participants, etc.

## **2.c.2 Measuring Objectives and Setting Deadlines**

As well as providing a solution for the detected problems, objectives must be measurable. That is, **in their wording, they must include expressions that will help to measure outcomes after implementing the suggested actions.** This will be useful in assessing the effectiveness of the activities once they have finished, and even take remedial action if the results are not the expected ones. This is why another variable when drawing up action plans in the policy is setting deadlines.

**Objectives must include the time allotted to fulfil them.**

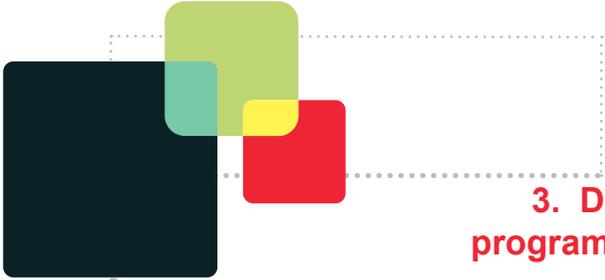
For example, let us take a look at the following general objective:

***Bridge the gap in women’s participation within the organisation.***

As you can see, this objective is too broad and does not show any indicator to measure its achievement, nor the time allotted to fulfil it. The correct formulation would be the following:

***Reduce the gap in women’s participation to a half in the space of a year.***

Expected time scales must be realistic. Therefore, we should take into account variables such as the organisation's readiness to change, available resources (human, physical, economic), etc.



### 3. Designing Activities and programmes. Some Guidelines

Once the organisation has set the objectives, it is time to design the activities to fulfil each of them. Before, however, it is necessary to agree on:

- The resources needed (personal, financial, infrastructural);**
- When they will take place (draw up a schedule);**
- Who will conduct each of them,**
- How their effectiveness will be measured (this will come up from the objective indicators);**
- When evaluations will take place;**
- And who will supervise them.**

Some of the activities defined in a programme will be interrelated; others will be independent. However, they will all contribute to fulfilling the objectives set in the policy.

In the next point, you will find detail of sample activities and programmes divided into problem areas to solve that may help unions to design their own.

#### 3.a. Participation and Quotas

One way to increase women's participation in the organisation is by setting quotas. The principle behind this system is selecting women for decision-making positions and ensuring that they are not discriminated against. This method should be used only until participation balance becomes a natural process and once the barriers that widen the gender gap are broken through. UNI's 40% Resolution is a response of this sort.

Possible actions:

- Amending the organisations' statutes, increasing the number of positions in Congresses and other decision-making structures, and**

reserving the extra positions for women.

- Establishing a minimum percentage for women's participation in all ranks of the union.
- Designing a women inclusion programme in the lower ranks. They will act as observers at the Executive Committee meetings or upper decision-making ranks. (Apart from the women that have active participation in those ranks). This procedure will let the members become more familiar with the decision-making processes in the organisations' upper ranks.
- Designing a selection and appointment system known to all members which fosters a balanced representation in the elections for decision-making positions.

### 3.b Specific Institutional Structures

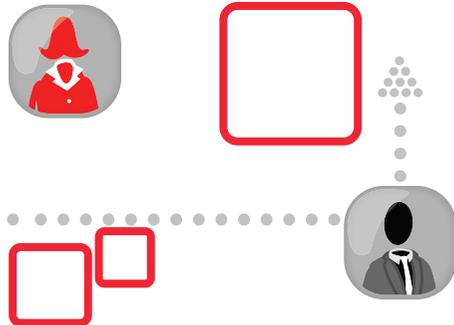
Some possible actions:

- Creating a **Women's Committee** in order to promote women's participation and activism in the union. The union should provide this kind of committee with funds for their work.

By enabling women's participation in regular meetings and subcommittees on issues such as education, collective bargaining, community participation or women's health, women members will also get familiar with the union policies that affect them.

- Creating institutional structures such as a **Committee for the Protection of Women** or the **role of women's defence counsellor**. Its members should be trained to deal with claims and solve conflicts in case of sexual harassment, bullying and other types of harassment and violence.

- Establishing a **penalty system**, known to all the members, to discourage bad



practices.

- Creating a **Committee for the follow-up, assessment and readjustment** of the gender equality policy or policies implemented.

- **Programmes on Internal Equality Audit in Collective Bargaining**, in order to evaluate collective bargaining agreements before their negotiation. This will open up the possibility of negotiating the inclusion of provisions against harassment and for training, equality at the workplace, equal remuneration, work-life balance, etc.

- Diversity-based team building.

### 3.c Training

Some possible actions:

- Mentoring and coaching programmes for young women leaders.
- Training programme on how to frame labour policies and on Collective Bargaining negotiations.
- Training programme for women on Union Leadership.
- Training programmes on issues related to gender mainstreaming for those responsible for the ongoing monitoring of the Gender Equality Policy implementation.
- Training programmes on Occupational Health, Sexual, and Reproductive Health.
- Training programmes for trainers with a gender mainstreaming perspective.
- Training programmes for the members of the Committee for the Protection of Women.
- Training programme “Men in Favour of Gender Equality”, aimed at men in the union.

### 3.d Communication, Information and the Culture of Equality

Some possible actions:

- Broadcasting programmes on gender equality in the union. Development of information campaigns on gender equality and mainstreaming, through the design of posters, leaflets, webpages, online workshops, etc.

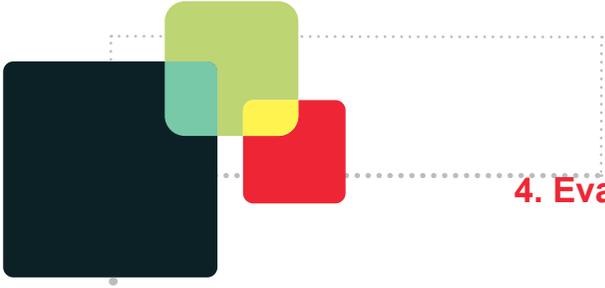
- Building up or reinforcing women’s networks for women to have greater

participation in the union's activities.

- Forging bonds and alliances with women and community organisations in order to move forward gender equality and human rights issues in the workplace and in society as a whole.
- Building up networks and establishing forums within the union and with other organisations in the sector and the region, as well as inter-sector and inter-regional in order to share and learn from best practices in breaking through barriers to achieve gender equality.
- Developing a guide on best practices in using non-sexist language in collective bargaining.
- Developing a guide on expected behaviours towards equality, inclusion and flexibility for all union members.
- Conducting periodical surveys and research on gender issues and releasing reports available to all members.

### **3.e Work-Life Balance**

- Programme to reduce the working hours of workers with family responsibilities.
- Programme on home work.
- Programme to foster breastfeeding by reducing working hours, providing nursing facilities, etc.
- Reinsertion programmes after parental leave.
- Providing childcare services and facilities in the union.



## 4. Evaluating Achievements, Transparency and Communication

### 4.a The Evaluation

The evaluation of the activities suggested in the programmes and projects stated in the policy needs ongoing monitoring and periodical reviewing and evaluation. These assessments are conducted during the implementation of the activities and once they have finished, in order to assess the achievements.

The objectives of the evaluation are:

**Following up the development of the programmed activities.**

**Measure results**

**Optimize the processes by learning from failure and success.**

**Compare what was actually done with what had been programmed.**

**Define measures to take in future programmes or projects.**

There are different kinds of evaluations, according to the specific moment when they are done.

**Ongoing Evaluation:** It is conducted while the project is being carried out. It helps in detecting the extent to which objectives are fulfilled.

**Evaluation of Achievements:** It is conducted when the project is complete. It focuses on the degree of fulfilment of objectives and on demonstrating that the changes in a specific situation are a consequence of the activities performed during the project. It evaluates both positive and negative or unexpected effects.

#### 4.a.1 The Link Between Achievements and Key Performance Indicators.

**Key Performance Indicators (KPI)** are instruments to measure the achievement of set objectives. They define the purpose and scope of the project, before implementing the activities. A certain achievement is measured in each of its constituent stages with the valuation that follows it. It is therefore necessary to define KPI for each of the objectives.

---

For this reason, it is crucial, as mentioned in the previous chapter, that objectives are measurable.

KPIs should supply information in order to find out:

**What criterion or variable changes?**

**In what sense?**

**To what extent?**

For example, if we use the example mentioned in the previous chapters, the objective is:

***“to set institutional mechanisms in order to foster women’s participation in training activities and to double women’s participation next year.”***

***In this case. The KPI will be the difference between the number of women in the training courses before and after implementing the suggested activities.***

If the final figure is twice as high as the initial one, then the objective will have been achieved. If not, the people in charge will have to review the reasons for the failure.

Among the reasons for failure, we can find:

*Mistakes in the design:* they may be the result of inexistent or wrong estimate of targets; lack of clarity or bad organisation of the processes and/or activities; little congruence between the activities programmed and the organisational structure.

*Faulty implementation:* the people responsible for the operation failed to comply with the programme (processes, activities, structure).

*External factors:* noncompliance with the definitions given or appearance of new contextual and unpredictable elements, which change the scenario in which the project has been implemented.<sup>3</sup>

For the evaluation, it is necessary to take into account:

a– Raise awareness among the people responsible for recording the information of its importance. In order to do so, it would be wise to explain what it will be used for. If people do not know why certain information is being collected, their commitment falls and the reliability of the results lowers.

3 Cohen, E. y Martínez, R. Manual de Formulación, Evaluación y Monitoreo de Proyectos. Sociales, CEPAL. p.80

- b– The instruments, reporting tools and data processing should be the same throughout, in order to compare data and results over time.
- c– If it is technically and economically possible, use IT systems for reporting and transmitting information (local networks technology, the Internet and the e-mail). This considerably reduces the possibility of making mistakes when passing on information.
- e– When we work with a multidisciplinary programme, it is better to appoint a supervisor who does not take part in any of the operations.
- f – It is also necessary that supervisors have a guide to record data stating the activities, KPIs, recording units, and recommendations or information that needs special attention.

#### **4.b Publishing the Policy and the Achievements**

Publishing the policy in the organisation is one of the keys to its effective implementation. As members know more about the policy, their commitment to reach the objectives increases.

For the external image of the organisation, it does not only help to show that it has taken all the necessary measures to prevent gender discrimination and promote equality but also sets an example of best practices that could motivate other organisations to move along the same path.

There are two types of audiences, with different information requirements: the more a person is involved in the project management, the more detailed the information they will need. Instead, external actors and the civil society demand more general information and less frequently.

The reports to be published can be:

- a– Descriptive or comparative: the former only explain what was observed in the project at a certain point, while the latter analyse results in terms of other projects, or the same project in a different moment or context (general population without a project).
- b– Interim or Cumulative: the former are restricted to the specific point when they are analysed while the latter use temporal series.
- c– Numbers or Graphs:
  - \_ Data Tabulation: they provide an image of the results of each indicator and they allow for quantifying existing differences.
  - \_ Graphs: There is a wide variety that may be used. They are useful to describe a certain variable or compare and illustrate the whole series. They are less accurate but easier to interpret.

#### 4.b.1 How Can Information Be Systematized? Using a Matrix

Any gender equality policy will describe a series of objectives and activities to achieve them that involve and produce a lot of information. One way to organise that information is by using a matrix.

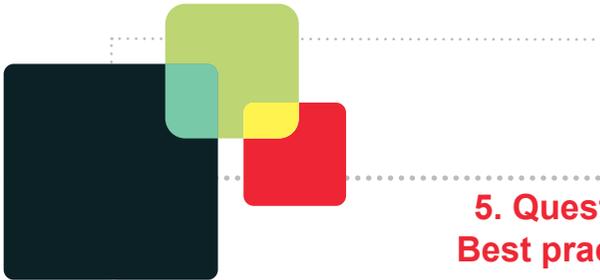
It is a double entry chart where all the objectives set in the policy, the KPIs to measure changes and the timeframes are listed.

Below, there is an example for guidance:

<b>Objective:</b> <i>“To set institutional mechanisms in order to foster women’s participation in training activities and to double women’s participation next year.”</i>				
<b>KPI</b>	<b>Current number</b>	<b>Results obtained</b>	<b>Difference</b>	<b>Observations</b>
Number of women participating in Course XX				
Number of Women participating in Workshop xx				
Number of women participating in Training Course xx				
<b>Total number of women participating in training activities</b>				

**Objective:**  
**“To establish a minimum of 40% women representation in all the decision-making structures of the union by the next August, 2012 Congress.”**

<b>KPI</b>	<b>May 2011</b>	<b>August 2012</b>	<b>Difference</b>	<b>Observations</b>
Percentage of Women in the Executive Committee				
Percentage of Women in the General Assembly				
<b>Percentage of women in Decision-making positions</b>				



## 5. Questionnaire on Policies and Best practices in Gender Equality

UNI designed a questionnaire for their affiliates in order to find out the practices they promote in the field of Gender Equality.

In the near future, this information will be compiled and released to make it public to all organisations as an action guide to improve their practices.

Union's Name:

Sector:

Number of Affiliates:

Date:

How has your organisation fostered equal men and women's participation and representation at the representative level and decision-making structures?

What have been your organisation's achievements in their attempt to improve gender relationships, women-men balance or regarding women's situation, options and opportunities?

Is there a policy to ensure gender equality within the organization?

What are the policy's objectives?

Do you think that your organisation has achieved the objectives defined in their policy?

Has your organisation adopted an action plan to fulfil the objectives mentioned above? Please, specify programmes, activities, distribution of responsibilities, schedule, etc.

What type of training resources (seminars, material, etc.) are used to raise awareness, train and develop skills related to staff gender?

What kind of information, gender statistics and research does your organisation

collect?

How does your organisation use the information/statistics mentioned above?

What kind of activities related to gender equality issues are specifically designed for men and women?

What kind of activities does your organisation participate in, in collaboration with other local, national or international social entities?

What specific internal and external changes does your organisation describe as the result of the activities and strategies mentioned above?

What factors have contributed to the success in promoting and implementing gender equality policies and the activities related to them?

What factors have hindered success in promoting and implementing gender equality policies and the activities related to them?<sup>4</sup>

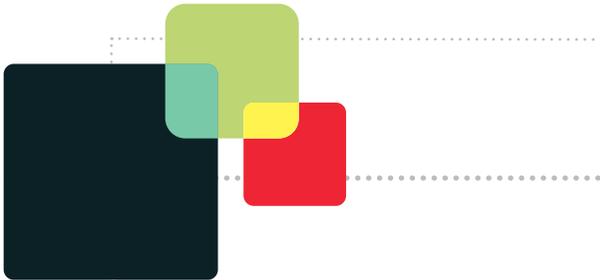
Name of the person who completed the questionnaire:

Position:

Should anyone need assistance, help or advice on their equality programme , please contact us at: [women@uniglobalunion.org](mailto:women@uniglobalunion.org)

---

4 Good Practices at the Workplace, ILO, Gender Equality Office, 2005.



## Bibliography

ABC of Women Workers Rights and Gender Equality, ILO, Geneva, 2000, p. 48.

ETUC Resolution – Recommendations for Improving Gender Balance in Trade Unions – January, 2011.

Good Practices at the Workplace, ILO, Gender Equality Office, 2005.

CEPAL, UNIFEM, UNPFA. (2006) “Technical Assistance Guide for the Production and Use of Gender Indicators”

Cohen, E. y Martínez, R. Research techniques for programme planning, monitoring and evaluation, CEPAL.

GENDER EQUALITY AND EQUALITY, A summary review of UNESCO’s accomplishments since the Fourth World Conference on Women (Beijing 1995). Unit for the Promotion of the Status of Women and Gender Equality, May, 2000

Luciana Fainstain, Valentina Perrotta, Guía para el diseño de un diagnóstico organizacional con perspectiva de género, Inmujeres, Uruguay, 2001.

